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SETTING THE STAGE FOR THE LAND USE PLAN UPDATE

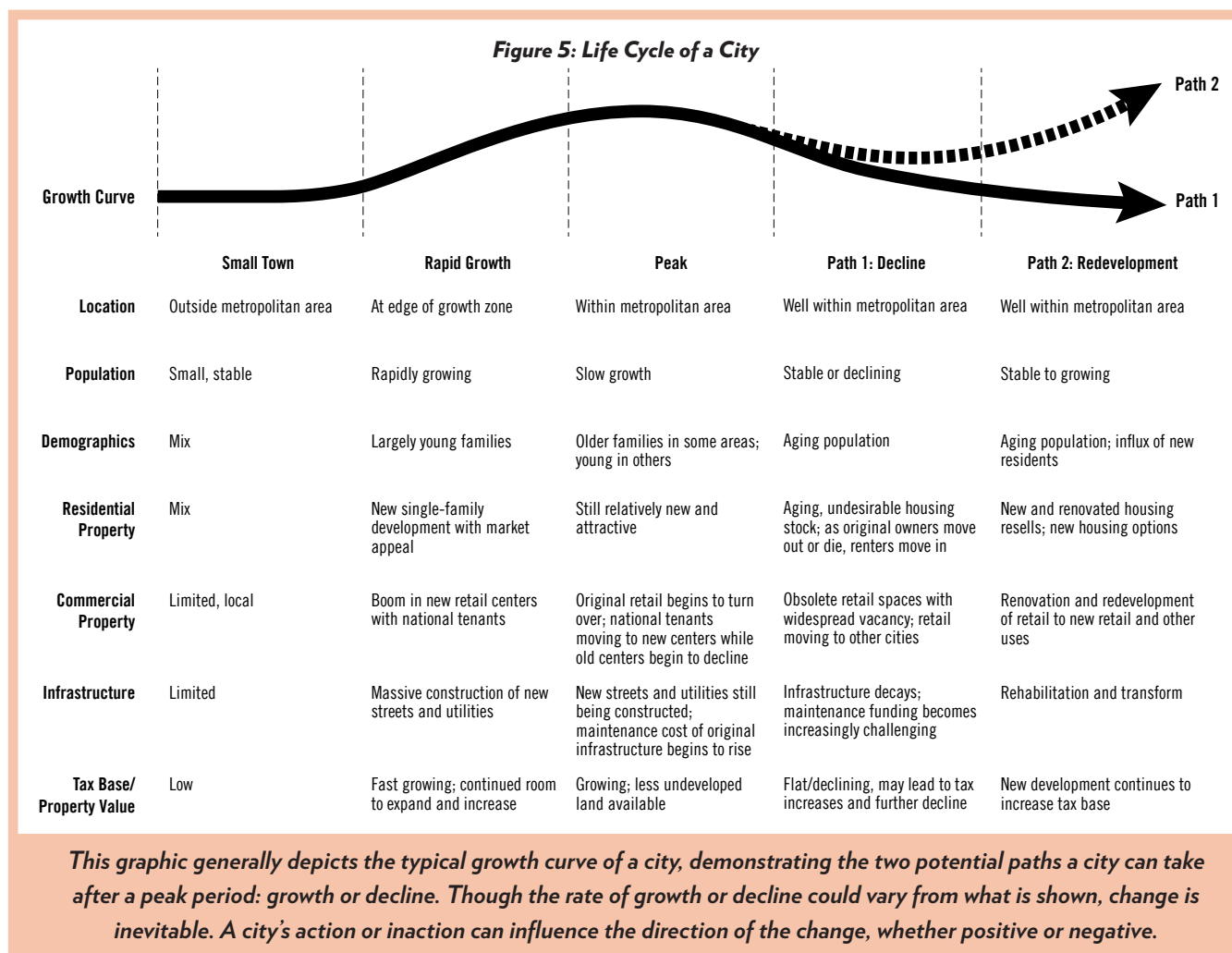


Why Update the Land Use Plan: A City in Transition

The City of Sugar Land is at a transitional moment in its history. Before incorporation, Imperial Sugar developed a company town that became a city in 1959. Since then, it has been a fast-growing suburban city, increasing in population from 3,000 to 79,000 between 1960 and 2010. By 2020, the population of Sugar Land is expected to be approximately 121,000 and is ultimately expected to be approximately 134,300 after all ETJ areas have been annexed into the city limits.

For the first time in the City's history, over 10% of the City's population is over 65 (2010 US Census) and the median age of the City has consistently increased for at least the last three decades.

Today, 93% of the land within the city limits is developed. Meanwhile, housing and commercial development from the 1970s and 1980s is aging and market preferences are shifting. Ultimately, Sugar Land is competing with other places around the Houston region and the United States for residents and businesses. The Houston area has many examples of places that were once premier residential and commercial areas but have declined. Sugar Land should not take for granted that the city will continue to be a prominent destination without responding to the shifts and adapting to remain competitive. To date, land use planning in Sugar Land has focused on new greenfield development. As the last remaining vacant properties within the City develop, the focus is shifting to guiding infill and redevelopment in order to preserve the value of existing neighborhoods and commercial districts.



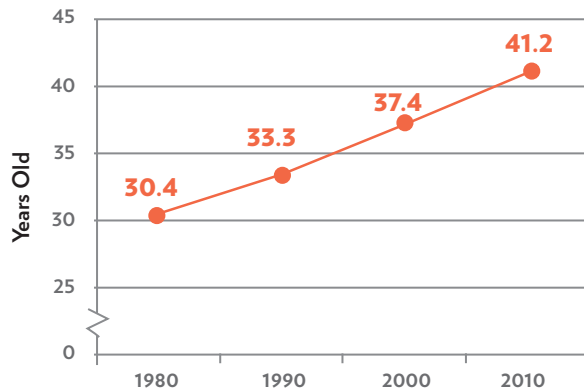
The following pages further illustrate Sugar Land's demographics and trends which demonstrate this transitional moment.

Population is aging.

Sugar Land Census data trends indicate an aging population. Since the 1980s, the median age has continually increased, from 30.4 (1980) to 41.2 (2010). There has also been a change in the age distribution of the population that further shows this aging trend. For example, since the 1960s there has been a steady decrease in number of residents in the 0-14 age group. At the same time, both the 45-64 and over 65 age groups have continued to increase.

Figure 6: Sugar Land Median Age

Source: U.S. Census 2010



Since the 1980s the median age has continually increased, from 30.4 (1980) to 41.2 (2010).

Figure 7: Sugar Land Age Distribution

Source: U.S. Census 2010

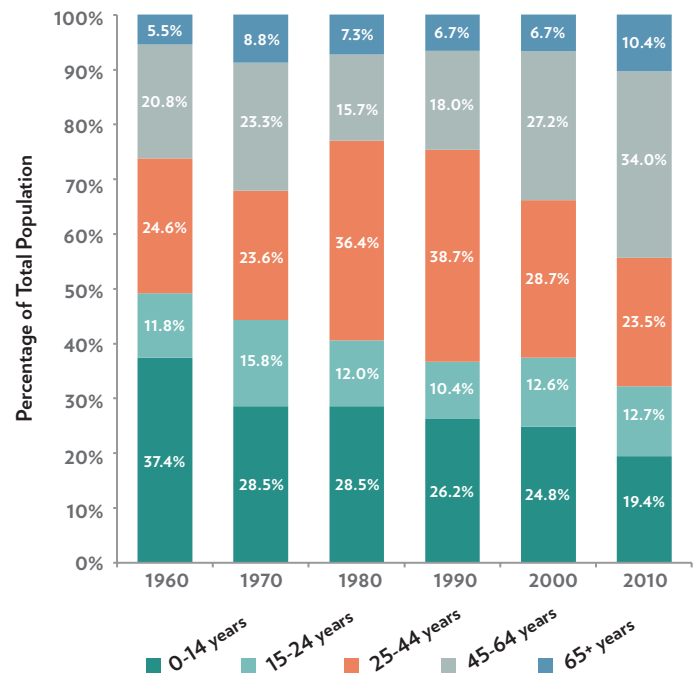
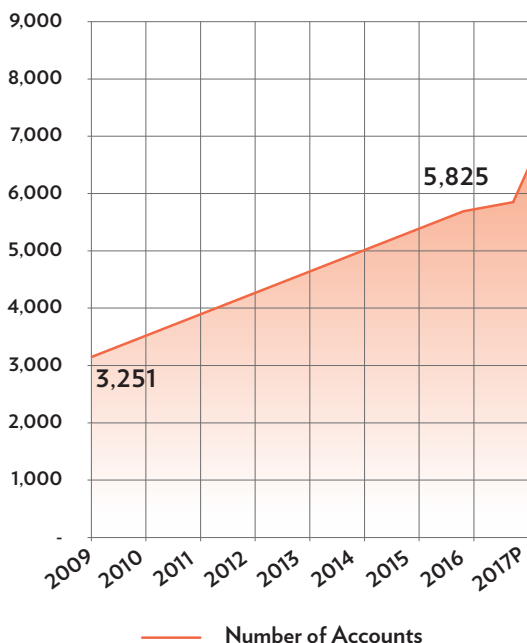


Figure 8: Number of Accounts with 65+ Exemption



↑ 72%

increase
since 2009
or
2,350 accounts

\$545,125 in additional exemptions
from 2009-2016

Equivalent to:

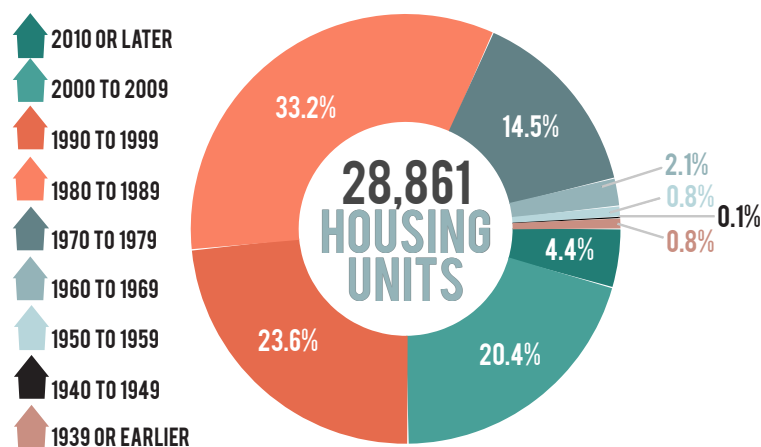
3 Police Officers or
\$2 Million in Debt Service
for street reconstruction

Housing stock is aging.

The majority of residential units in the City were built during the 1980s and 1990s, and less than 5% of the housing stock has been built since 2010. Therefore, the majority of the housing units in the City are over 30 years old. In response to market demands that these aging homes cannot fulfill, homebuyers have purchased older homes, demolished them and rebuilt a newer (often larger) home on the same lot. For example, 81 complete house demolitions occurred between 2000 and 2015 and only 7 have been due to fire damage. The majority have been for the purpose of rebuilding on the same lot. 85% of these demolitions have been concentrated in the older neighborhoods north of U.S. Highway 59.

Figure 9: Sugar Land Housing Stock

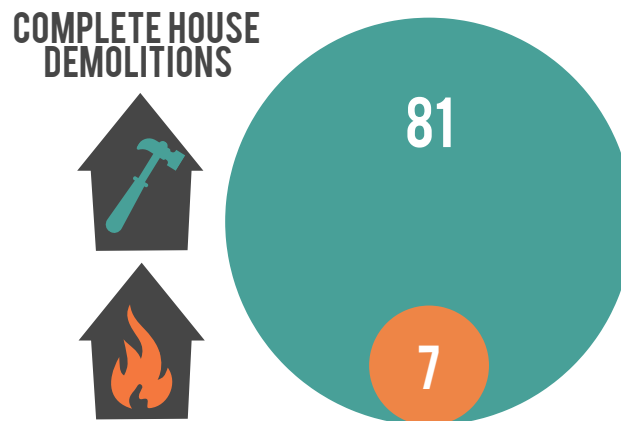
Source: 2011-2015 American Community Survey 5-Years Estimates



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Figure 10: Sugar Land Housing Demolitions

Source: City of Sugar Land Permits and Inspections



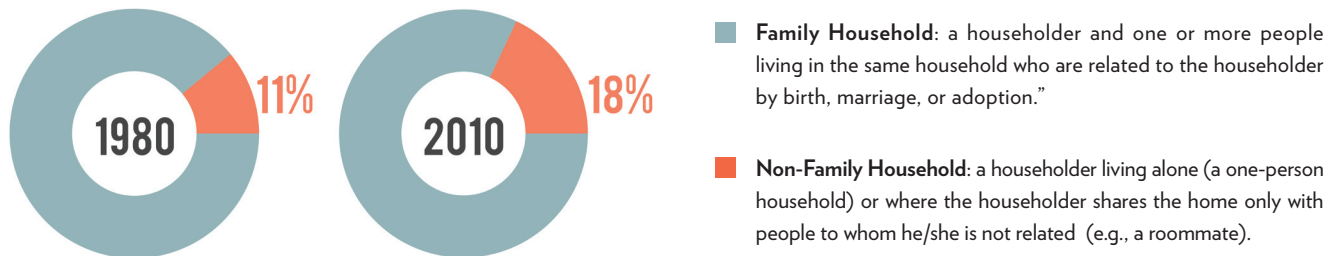
81 complete house demolitions occurred between 2000 and 2015 and only 7 have been due to fire damage.

Household sizes are decreasing, demand for rental is increasing.

Sugar Land Census trends show average household sizes decreasing and the makeup of households changing. The average household size decreased from 3.73 to 2.9 between 1960 and 2010. The percentage of family households decreased, while non-family households increased between 1980 and 2010. In the same 30 years, renter occupied units have increased from 9% to 18%, while owner occupied units have decreased from 91% to 82%.

Figure 11: Sugar Land Family vs Non-Family Households

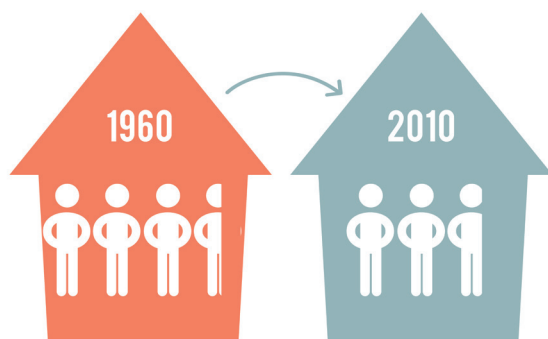
Source: U.S. Census Bureau



The percentage of family households decreased, while non-family households increased between 1980 and 2010.

Figure 12: Sugar Land Average Household Size

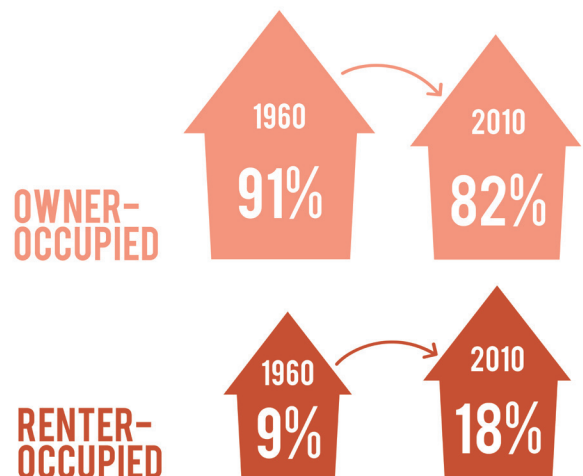
Source: U.S. Census 2010



The average household size decreased from 3.73 to 2.9 between 1960 and 2010.

Figure 13: Owner vs Renter Occupancy Rates

Source: U.S. Census Bureau

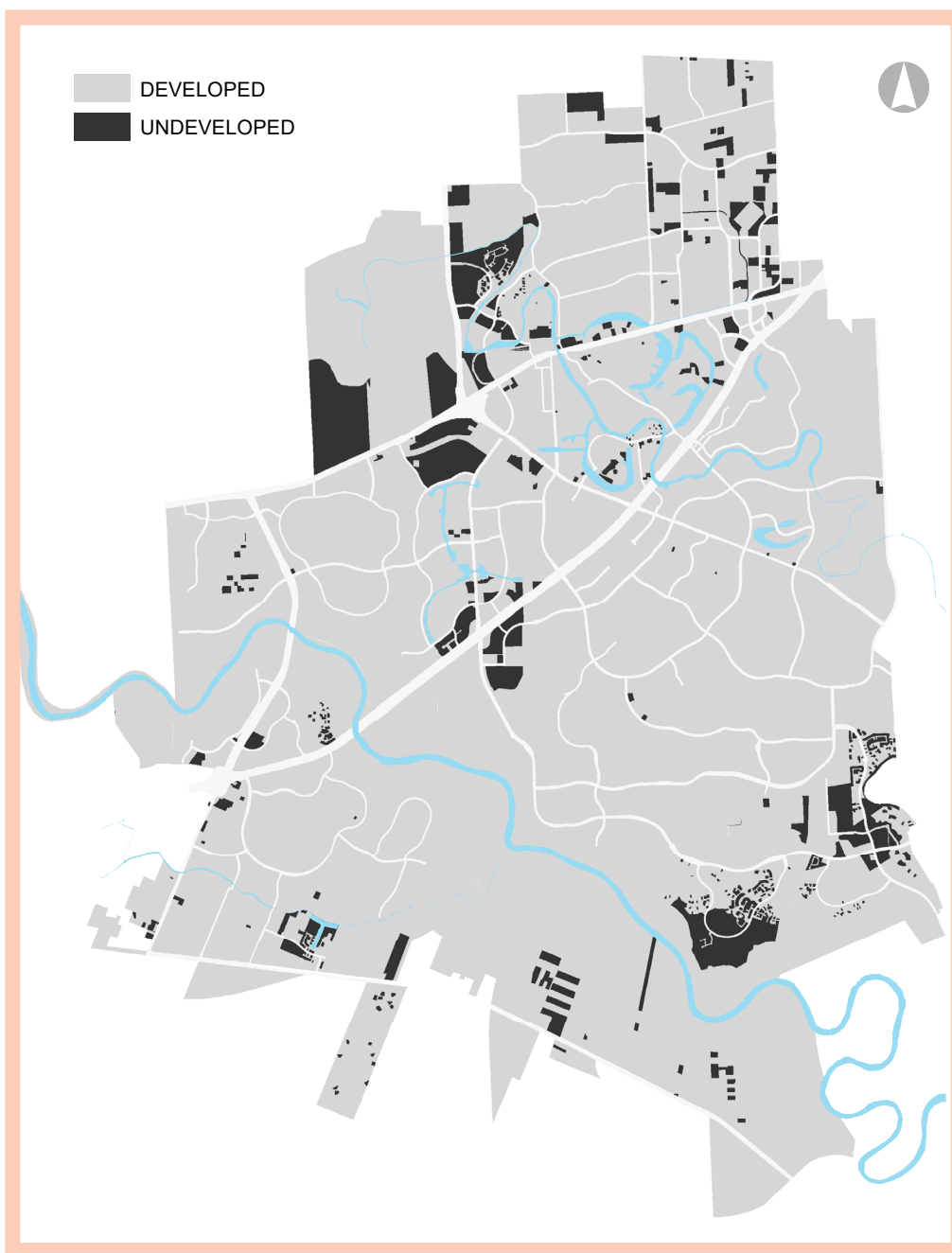


Renter occupied units have increased from 9% to 18%, while owner occupied units have decreased from 91% to 82%.

Vacant property to develop is diminishing.

Within Sugar Land and its ETJ, only 7% of the land is currently undeveloped. With such little land left for new development, the decisions made for this remaining acreage become critical for the long-term strength of the City. Having the right land uses and development styles help achieve the goals and vision of the City. This Plan should be used to help guide those decisions to ensure desired outcomes.

Figure 14: Developed vs. Undeveloped Property in Sugar Land



Majority of those employed in Sugar Land live outside the City.

In 2014, Sugar Land had approximately 61,000 jobs; of these, 91% were filled by people living outside the City of Sugar Land, and only 9% were filled by people living in Sugar Land. Of the 38,344 employed residents of the City, 32,885 worked outside of the City. While the number of jobs in Sugar Land increased from 36,500 to 61,000 between 2002 and 2014, the number of both living and working in Sugar Land remained at around 5,500. The top locations where Sugar Land residents work are Downtown Houston, Sugar Land Town Center, and the Texas Medical Center. The top locations where people who work in Sugar Land live are Aliana, Pecan Grove and Commonwealth/ Riverstone.

Figure 15: Sugar Land Job Count

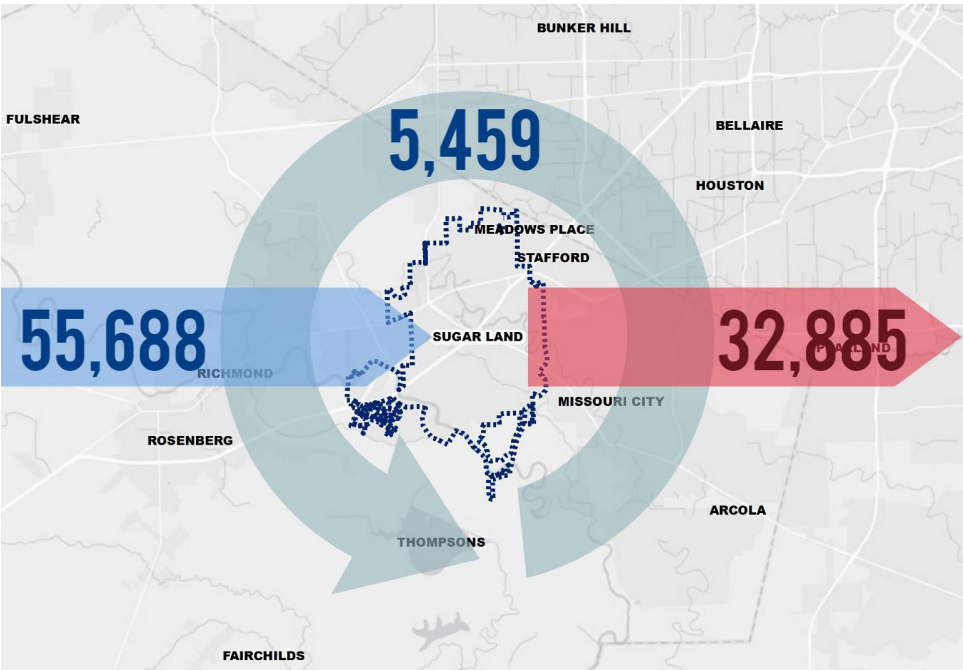
Source: U.S. Census Bureau, Longitudinal Employer Household Dynamic Program, 2014



The number of jobs in Sugar Land increased from 36,500 to 61,000 between 2002 and 2014.

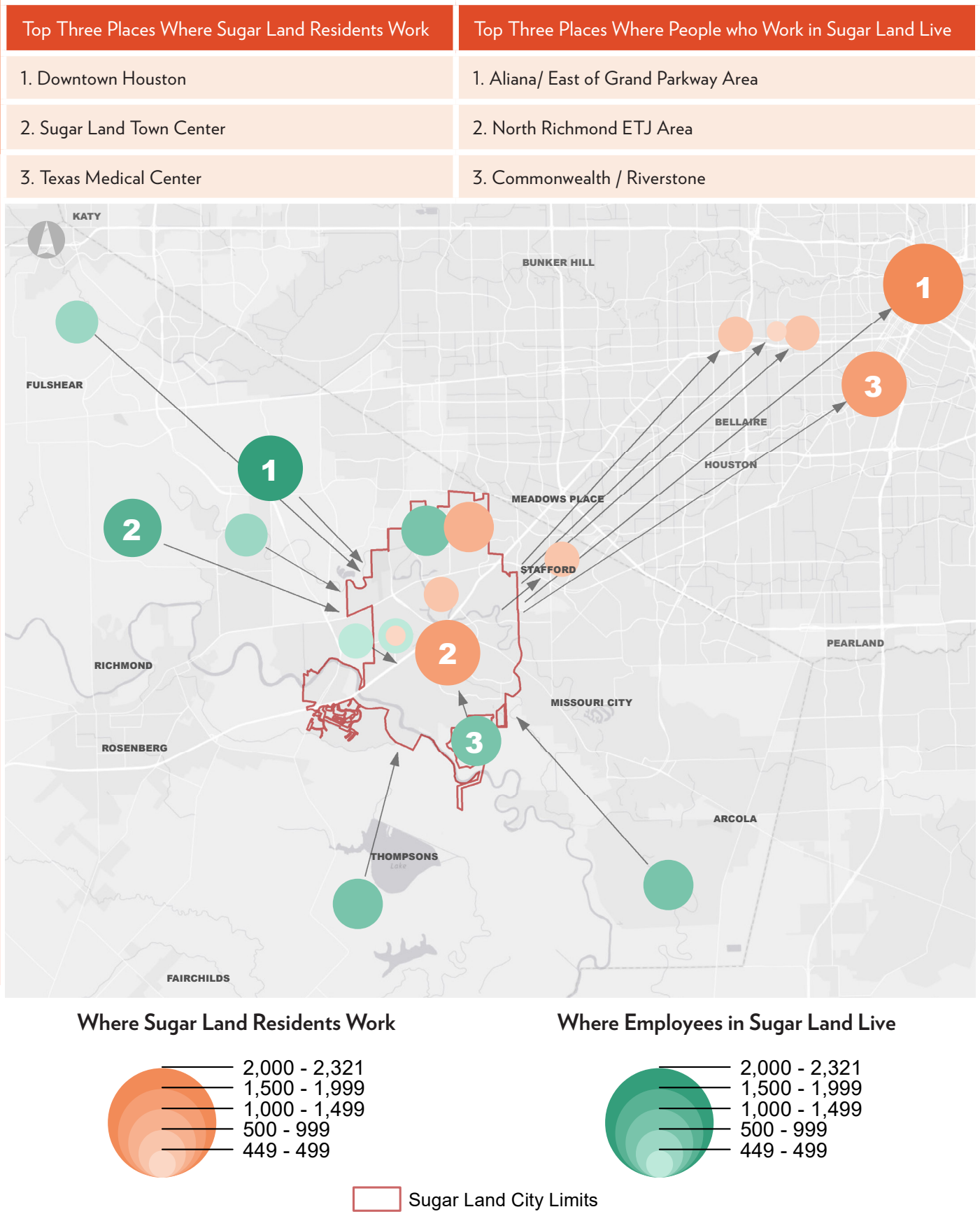
Figure 16: Sugar Land Job Inflow/Outflow

Source: U.S. Census Bureau, Longitudinal Employer Household Dynamic Program, 2014



Of the 38,344 employed residents of the City, 32,885 worked outside of the City, leaving only about 5,500 both living and working in Sugar Land.

Figure 17: Sugar Land Job Inflow/Outflow Locations



Topics Addressed in the Land Use Plan Update

In light of these trends and changes that Sugar Land is experiencing, this Plan must address six important questions:

- 1. How should the limited undeveloped land within city limits be developed to maximize its value to the city and its residents?
- 2. What should be done to retain the value of existing neighborhoods as housing stock ages?
- 3. What should be done with the existing multi-family sites, as they age and market preferences change? Should new multi-family be allowed in the City, and if so, under what circumstances?
- 4. Where is redevelopment desirable, what form should it take, and what role should the City play?
- 5. How can Sugar Land remain a desirable place and continue to be a regional destination to live, work, play and shop in light of shifting trends and changing demographics?
- 6. How can we improve mobility and connectivity with our land use/ development decisions?

As part of the Comprehensive Plan, this updated plan will provide a road map to the City of Sugar Land in how and where to develop or redevelop. The Vision articulates the overarching direction for the city in the long term. The Goals are specific targets set by the city. The Policies within each Goal are a set of guidance to achieve the Goal. This Plan also recommends a list of actions that the City should explore or pursue to support the vision and goals of the Plan.

Figure 18: Relationship of Vision, Goals and Policies

